



2008 Ferry Customer Survey

Technical Paper #7: General Market Area & Infrequent Rider Survey

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Preface

While the primary focus of the 2008 WSF Customer Survey is existing ferry users, questions were raised over the course of the study about the actual incidence of ferry customers in the communities surrounding Puget Sound that are served by WSF and the extent to which travel on the ferries has changed as a result of fare increases and/or changes in level of service. A specific area of concern is whether an on-board survey could capture the attitudes and behaviors of infrequent riders who might not have ridden the ferry during the on-board survey sample periods. Thus the General Market Area and Infrequent Rider Survey was designed to supplement the on-board survey by specifically capturing both opinions of people in the wider Puget Sound marketplace and those that are very infrequent riders of the ferry system.

To address these questions and ensure representation of all residents of the Puget Sound region that are served by WSF, the General Market Area and Infrequent Survey was conducted to measure:

- Current and past ridership on Washington State Ferries,
- Changes in ridership,
- Importance / value of Washington State Ferries, and
- Support for funding options.

This Technical Paper summarizes the key findings from this General Market Area and Infrequent Rider Survey.

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Overall Summary – General Market Area Survey

Although the primary focus of the 2008 WSF Customer Survey is existing ferry users, the purpose of the General Market Area Survey is to provide a reliable estimate of current and past ridership among residents of areas immediately surrounding Puget Sound. These areas are made up of counties or portions of counties where residents have the greatest access to, and hence, the greatest likelihood of riding the ferry. These areas include:

- East of Puget Sound: King (excluding Vashon Island), Pierce, Snohomish, and Skagit;
- West of Puget Sound: All of Kitsap and Island and portions of Clallam and Jefferson Counties; and
- Island: Vashon and San Juan Islands.

For the General Market Area Survey, a total of 1,240 Puget Sound area residents were surveyed – 333 of whom live in the ferry communities located west of Puget Sound, and 57 of whom live on Vashon or one of the San Juan Islands. Key findings from the General Market Area Survey include:

Nine out of ten (91%) people living in areas served by the WSF have ridden a Washington State Ferry, clearly demonstrating that WSF is a resource that serves nearly all area residents.

- **All island** (Vashon and San Juan Islands) **residents surveyed have ridden a ferry within the past three months** – 95 percent within the 30 days before the general market survey.
- **Nearly three out of four** (74%) residents of the communities on the west side of Puget Sound (Kitsap, Island, Clallam, and Jefferson Counties) who have ever ridden a ferry have ridden within the past three months – 54 percent within the past 30 days.

Three out of five (60%) Puget Sound residents are infrequent riders of the system – that is, they ride the ferries but have not ridden in the 3 months prior to the general market survey. This again clearly demonstrates the extent to which WSF serves, at some point in time, nearly all Puget Sound area residents.

- More than half (52%) of all infrequent riders ride less than once per year; 24 percent ride at least once a year.
- Those living in the West Puget Sound communities (Kitsap, Island, Clallam, and Jefferson Counties) ride more often – 24 percent ride at least once every six months and 5 percent ride at least every three months.

As would be expected, the **majority of infrequent riders use the ferry for recreational travel** (48%), social visits to friends and family (16%), and for other personal activities (20%).

- Routes used last for these trips are Seattle / Bremerton and Edmonds / Kingston (20% each).

A critical question that was addressed in this survey is whether infrequent riders have stopped riding or decreased the frequency of riding WSF and if so – why? The study found that **43% of all infrequent riders say their riding has decreased or stopped.**

- **Twelve percent (12%) of all infrequent riders say they have stopped riding completely.** More than three out of five (62%) respondents who state they have stopped riding completely say that the primary reason is because they no longer do what they used to do.
 - In addition, 7 percent of infrequent riders who say they have stopped riding completely mention high fares as a secondary reason for no longer riding.
- **Nearly one-third (31%) of all infrequent riders say the frequency with which they ride has decreased** – 21 percent say it has decreased significantly. Reasons given for riding less often include: no longer have a need to ride, (41%), their circumstances have changed (34%), and/or fares are too high (26%).

Seventy percent (70%) of all Puget Sound residents agree that WSF is very important to the general economy and growth of the region with another 25 percent saying that it is somewhat important. Once again, this supports the conclusion that Puget Sound residents feel that WSF is a valuable resource.

Opinions differ as to who should be responsible for the cost of maintaining the ferry system. Residents of the areas primarily served by WSF clearly feel that the **majority of the cost to maintain the system should be paid for by those using the ferries (50% of costs) and those living in communities that are served by the ferries (22% of the costs).**

- While the distribution varies somewhat by where people live, the general consensus is that between 34 and 50 percent of the cost of operation should be paid for directly through fares. Those in the island communities of Vashon and the San Juans are at the low end (34%) of this distribution.
- Area residents also feel that between 16 and 23 percent of the cost of operations should be paid for through fees and taxes paid by residents of the ferry communities.
- The balance – between 27 and 47 percent – feels that the costs of operating the system should be paid for by taxes from all Washington residents.

Key Findings – Demographics

Summary – Demographics

The general market study finds that those who have ridden the ferries in the past three months (i.e., recent riders) are more likely to be men (54%) than women (46%) while those that are infrequent Riders (those who have ridden the ferries but have not ridden in the past 3 months) are more likely to be female (55%) than male (45%).

- Those living in the island communities tend to be slightly older (average age is 50 years) than Puget Sound communities served by WSF (45 years of age).

The general population in the communities served by WSF is relatively affluent with median household income of \$69,188 compared to a statewide income of \$53,515.

Detailed Findings – Demographics

The general population of the Puget Sound communities served by Washington State Ferries is equally divided between men and women. There are some significant differences in the characteristics of those riding the ferries.

- Those who have ever ridden the ferries are more likely to be women (52%) than men (48%). On the other hand, those who have never ridden are more likely to be men (56%) than women (44%).
- Among those that have ever ridden the ferries, there are also significant differences based on how recently they have ridden.
 - Those who have ridden the ferries in the past three months (i.e., recent riders) are more likely to be men (54%) than women (46%).
 - Infrequent Riders (those who have ridden the ferries but have not ridden in the past 3 months) also are more likely to be female (55%) than male (45%). This is consistent with the March on-board survey that shows occasional riders (those taking fewer than 7 trips per month) are more likely to be female (59%) than male (41%).

On average, residents of the Puget Sound communities served by WSF are 45 years of age. Those living in the island communities tend to be slightly older – their average age is 50 years.

- Those who have ridden the ferries are slightly older than those who have never ridden the ferries – average age 46 years of age for riders compared to 37 years of age for those who have never ridden.
 - Nearly three out of five (59%) non-riders are between the ages of 18 and 34.
 - On the other hand, over half (54%) of those who have ever ridden a ferry are 45 years of age and older.
- There are no age differences between frequent and infrequent riders.

Puget Sound residents that have ridden a Washington State Ferry are more likely than those who have never ridden to be employed.

- Two thirds (66%) of those who have ever ridden a ferry are employed full-time, part-time, or are self-employed compared to 54 percent of those who have never ridden.
- Thirty percent of those that have never ridden a ferry are homemakers or are currently not employed. Note that this segment does not include those that are retired.

The general population in the communities served by WSF is relatively affluent. The median household income is \$69,188 (self-reported) as compared to the average household income statewide which is \$53,515 (from www.census.gov/hhes/www/income/income06).

- Puget Sound residents who have ever ridden a Washington State Ferry are twice as likely as those who have never ridden to have household incomes greater than \$75,000.
 - Nearly half (47%) of those who have ever ridden a ferry have a household income greater than \$75,000 compared to 22 percent of those who have never ridden.
 - The median household income for those who have ridden, but not in the past three months, is \$69,643.
- Those who have ridden the ferry recently (within the 3 months prior to the survey) are somewhat more affluent than those who have ridden but not in the past three months.
 - The median household income for those who have ridden recently is \$74,742. Thirty percent (30%) have annual household incomes of \$100,000 or greater.

Table 1: Demographics of General Population in WSF Affected Communities

	EVER RIDDEN			RIDDEN IN PAST 3 MONTHS		AREA OF RESIDENCE		
	ALL (n = 1,240)	YES (n = 1,160)	NO (n = 80)	YES (n = 501)	NO (n = 659)	EAST PUGET SOUND (n = 850)	ISLAND (n = 57)	WEST PUGET SOUND (n = 333)
Gender								
Male	49%	48%	56%	54%	45%	49%	49%	50%
Female	51	52	44	46	55	51	51	50
Age								
18 – 24	11%	10%	22%	11%	10%	11%	10%	12%
25 – 34	17	15	37	17	14	18	5	15
35 – 44	20	21	15	17	23	21	23	17
45 – 54	21	23	7	22	23	21	27	20
55 – 64	15	16	7	17	15	15	16	17
65 and over	15	15	12	15	15	14	20	19
Mean	45.4	46.3	37.2	45.9	46.5	45.1	50.2	47.6
Employment								
Full-Time	49%	50%	46%	49%	50%	50%	36%	41%
Part-Time	13	14	8	15	13	13	17	11
Self-Employed	3	3	1	6	2	3	6	4
Retired	16	16	16	16	16	15	28	22
Other	19	18	30	14	20	18	13	22
Income								
< \$15K	5%	5%	5%	5%	4%	4%	2%	6%
\$15K- \$30K	8	7	24	6	7	8	2	11
\$30K - \$50K	20	20	25	16	22	19	25	27
\$50K - \$75K	22	22	24	23	21	22	17	23
\$75K - \$100K	19	19	11	19	19	19	27	14
\$100K plus	26	28	11	30	26	27	26	20
Median	\$69,188	\$71,522	\$47,512	\$74,742	\$69,643	\$70,690	\$77,794	\$57,268

Key Findings – Ridership on WSF

Summary – Ridership on WSF

Almost all (91%) of the people living in areas served by the WSF have ridden a Washington State Ferry; this clearly demonstrating that WSF is a resource that serves nearly all area residents.

Seattle / Bremerton and Edmonds / Kingston are the routes most commonly taken by infrequent riders (20%) followed by Anacortes / San Juans (15%).

- Infrequent riders living in the East Puget Sound communities are more likely than those living in the West Puget Sound communities to say the last route they took was Anacortes / San Juans. In contrast, those living in the West Puget Sound communities are more than twice as likely as those in East Puget Sound communities to take the Seattle / Bainbridge ferry.

Nearly half (48%) of infrequent riders on WSF say the primary purpose of their last trip was for recreational purposes followed by personal activities and social purposes.

More than half (52%) of all infrequent riders ride less often than once per year; 24 percent rides at least once a year.

Over half (53%) of infrequent riders say there has been no change in their ridership; however, one in ten (12%) have stopped completely, and one in three (31%) have decreased their ridership.

- The primary reason given for no longer riding at all is because they no longer have a need to ride (62%).
- The reasons given by infrequent riders who are riding less is because they no longer have a need to ride (41%), they have had a change in their personal circumstances (34%), and/or the fares are too high (26%).

The number of infrequent riders mentioning any one of the 6 possible service area improvements is too low for any meaningful analysis. Even the issue of “ferry fares are too high” is only mentioned as the reason for decreasing the number of ferry trips by 63 respondents.

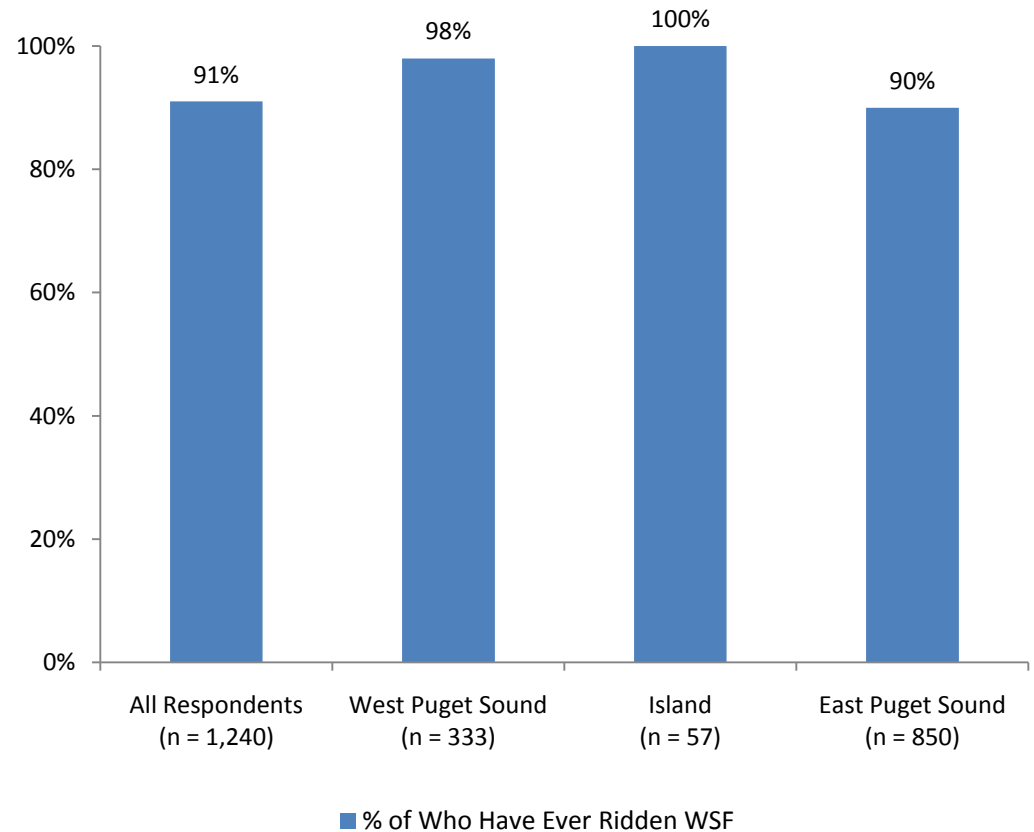
Detailed Findings – Ridership on WSF

Past Ridership

Past ridership of WSF does not vary by more than 10% across the major markets.

- As would be expected, **all (100%) residents of the Island Communities** (San Juan Islands and Vashon) and **98 percent of West Puget Sound residents** (Kitsap, Island, Clallam, and Jefferson Counties) have ridden a Washington State Ferry.
- Those living in the East Puget communities (King, Pierce, Snohomish, and Skagit Counties) are significantly less likely to have ridden than those in West Puget Sound communities and in the Island communities.
 - However, even in the East Puget Sound communities past ridership is high (90%).

Figure 1: Past Ridership on a Washington State Ferry



Question: Have you ever ridden a Washington State Ferry?

Most Recent Ferry Trip

The primary purpose of the General Market Area Survey is to understand the travel behaviors of infrequent or occasional WSF riders. The following questions were asked only of those respondents who have ever ridden a WSF ferry but have **not** ridden a ferry in the past three months. A total of 659 respondents in the General Market Area Survey answered a series of questions regarding their most recent ferry trip. The majority (566 respondents or 86% of infrequent riders) of those answering these questions are residents of the East Puget Sound communities (King, Pierce, Snohomish, and Skagit Counties). The remainder (93 respondents or 14 percent of infrequent riders) are residents of the West Puget Sound communities (Kitsap, Island, Clallam, and Jefferson Counties). Everyone surveyed in the Island communities (Vashon and San Juan Islands) have ridden in the previous three months; therefore, they are not included in this question series. The on-board surveys provide detailed data on ridership behavior for WSF's regular or more frequent riders.

Route Used on Last Trip

Respondents who have ridden a Washington State Ferry but not in the past three months were asked what ferry route they took the last time they rode. For the balance of this report we will refer to this segment as **Infrequent Riders**.

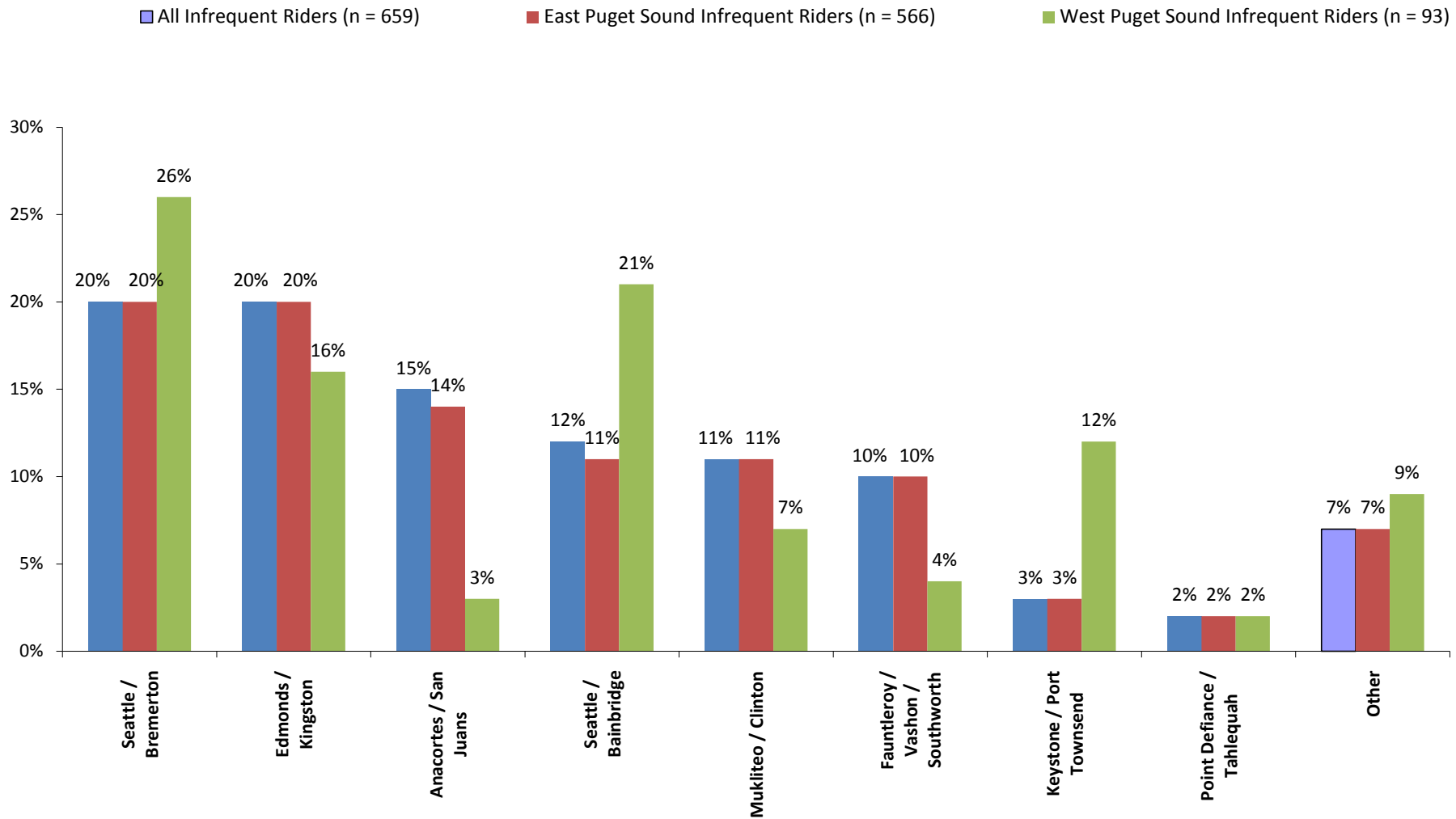
Seattle / Bremerton and Edmonds / Kingston are the last routes most commonly taken by infrequent riders. One out of five (20%) infrequent riders rode one of these routes on their last trip.

- Other routes taken last included: Anacortes / San Juans (15%), Seattle / Bainbridge (12%), Mukilteo / Clinton (11%), and Fauntleroy / Vashon / Southworth (10%).

The last route taken varies by where infrequent riders live.

- Infrequent riders living in the East Puget Sound communities are more likely than those living in the West Puget Sound communities to say the last route they took was Anacortes / San Juans (16% vs. 3%, respectively) and Fauntleroy / Vashon (6% vs. 1%, respectively).
- On the other hand, those living in the West Puget Sound communities are more than twice as likely as those in East Puget Sound communities to take the Seattle / Bainbridge ferry (21% vs. 11%, respectively). In addition, those living in the West Puget Sound Region are more likely to say the route they took last was Keystone / Port Townsend (12% vs. 3%, respectively).
- The high use of the Seattle / Bremerton and Seattle / Bainbridge ferries may reflect use by infrequent riders living in Bremerton, on Bainbridge Island, in Poulsbo, Silverdale, and/or Kingston who are choosing to take an occasional trip to Seattle. On the other hand, the somewhat higher than average use of the Port Townsend / Keystone ferry may reflect above average use by those living on Whidbey Island to travel the Peninsula.

Figure 2: Route Used on Last Trip



Question: What was the last Washington State Ferry route that you took?

Base: Respondents who have ridden WSF but not ridden within the last 3 months (n = 659)

Note: Other routes included primarily non-WSF routes and Whidbey Island (however which port was not specified).

Primary Trip Purpose of Last Trip Taken

Infrequent riders were asked the primary purpose of the last trip they took on a Washington State Ferry.

Nearly half (49%) of infrequent riders on WSF say the primary purpose of their last trip was for **recreational purposes**.

- The majority of those infrequent riders whose last trip was for recreational purposes were on the San Juan Islands (62%), Mukilteo / Clinton (57%), and Port Townsend / Keystone (56%) routes.
- Infrequent recreational riders tend to be younger (less than 54 years of age), female, and living in the East Puget Sound region.
- Among the West Puget Sound infrequent riders, more than half (53%) say their most recent trip was for personal activity (27%) or recreation (26%).

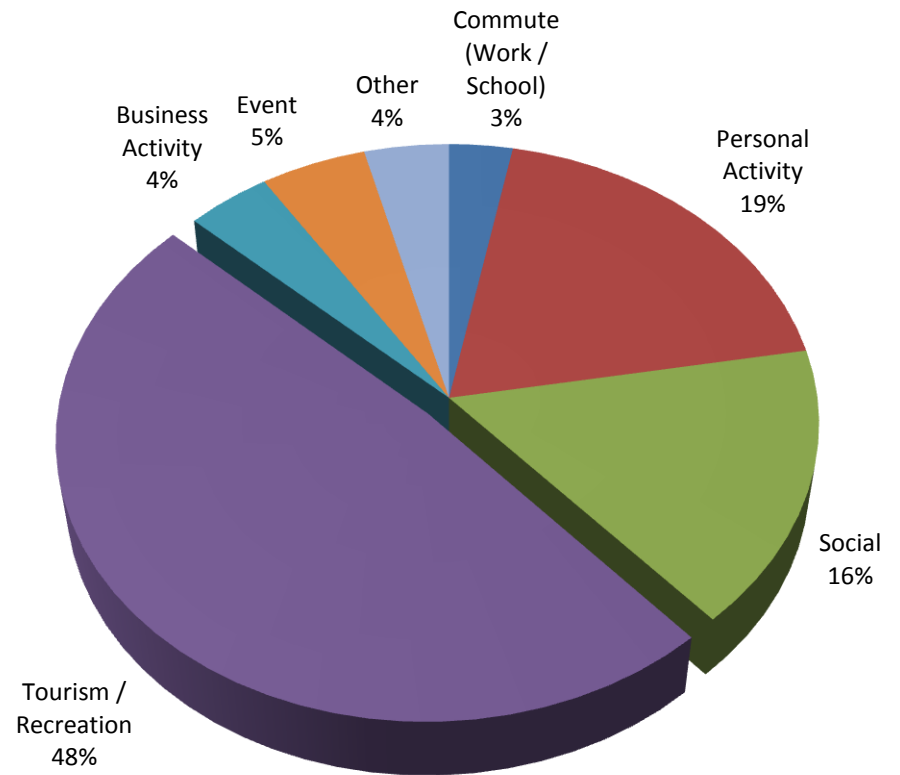
One out of five (20%) infrequent riders say they were traveling for a **personal activity** – which includes medical appointment, babysitting, funeral, child pickup/drop-off, volunteer, etc.

Another **16 percent** say they travel for **social purposes** – i.e., to visit family and/or friends.

- Those infrequent riders traveling on the Fauntleroy / Vashon / Southworth (31%) and the Edmonds / Kingston (25%) ferries are more likely to be traveling for social purposes.
- Those infrequent riders traveling for social reasons tend to be older (55+) and female.

Five percent (5%) of infrequent riders last used the ferry to get to / from a **special event**.

Figure 3: Primary Trip Purpose of Last Trip Taken



Question: What was the primary purpose of your most recent ferry trip?

Base: Respondents who have ridden WSF but not ridden within the last 3 months (n = 659)

Frequency of Riding Washington State Ferry

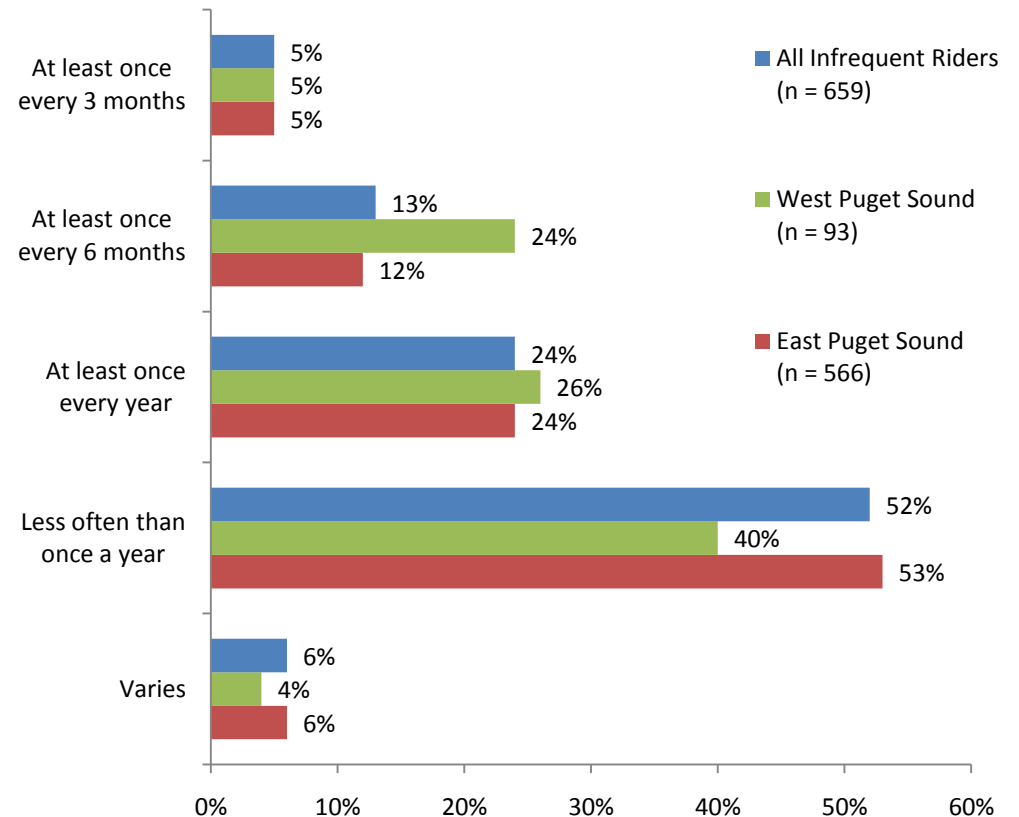
Frequency of Riding WSF

Infrequent riders (those who have ridden a WSF ferry but not in the past three months) were asked how often they ride the ferries.

More than half (52%) of all infrequent riders ride less often than once per year. Another 24 percent ride at least once a year.

- As would be expected, East Puget Sound infrequent riders ride less often than do West Puget Sound infrequent riders.
- Over half (53%) of the infrequent riders living in the East Puget communities ride less often than once a year compared with 40 percent of those living in the West Puget Sound communities.
- Twenty-four percent (24%) of infrequent riders living in West Puget Sound communities ride at least once every six months and 5 percent ride at least every three months (they had just not ridden in the three months prior to the survey).

Figure 4: Frequency of Riding WSF



Question: How often do you ride Washington State Ferries?

Base: Respondents who have ridden WSF but not ridden within the last 3 months (n = 659)

Change in Frequency of Riding

Infrequent riders (those who have ridden a WSF ferry but not in the past three months) were asked whether the extent to which their frequency of riding the ferries has increased or decreased. Those who have decreased or stopped riding completely were then asked why they are riding less often / no longer riding.

Over half (53%) of infrequent riders say there has been no change. Four percent (4%) report that they have increased somewhat their riding frequency.

- Half (52%) of all infrequent riders who have not changed or increased the frequency report that their last trip was for recreation or tourism.

Twelve percent (12% or 80 respondents) of all infrequent riders say they have stopped riding completely.

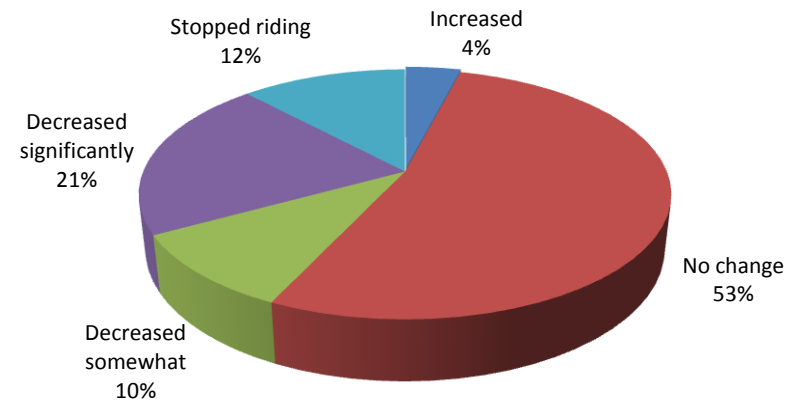
- More than three out of five (62%) infrequent riders who have stopped riding or (46 respondents) say that the **primary** reason they **no longer ride** is because they **no longer need to ride**, because they no longer do what they used to do.
- Other reasons given by infrequent riders who have stopped riding for no longer riding include*:
 - Fares are too high (9 respondents),
 - Elderly / Disabled / Stay home (8 respondents),
 - Change residences / moved (5 respondents),
 - Retired / no longer working (7 respondents).

Note: Total responses sum to more than 100 percent as respondents could give more than one reason for no longer riding.

Nearly one-third (31% or 204 respondents) of all infrequent riders say the frequency with which they ride has decreased. Infrequent riders who say the frequency with which they ride has decreased, give as the reasons for their decrease:

- No longer have a need (41%),
- Fares are too high (26%),
- Change in family situation (16%), and
- Change in work / school schedule (9%) or residence (9%).

Figure 5: Change in Infrequent Riders' Frequency of Riding



Question: Would you say the frequency with which you ride the Washington State Ferries has increased, decreased, or stayed the same?

Base: Respondents who have ridden WSF but not ridden within the last 3 months (n = 659)

* Due to the small number of respondents who stopped riding completely and who provided more than one reason for stopping riding, the actual number of respondents is shown rather than showing a percent of respondents.

Of particular concern is the extent to which **infrequent riders** in the Island communities, such as Vashon and the San Juan Islands, and the communities on the west side of Puget Sound (Kitsap, Island, Clallam, and Jefferson Counties) that rely heavily on the ferries have stopped or decreased their frequency of riding.

This study already establishes that on the Island communities of Vashon and San Juan Islands, no one meets the definition of an infrequent rider (i.e., had not ridden in the past month). Therefore, analysis here focuses on determining the extent to which those living in the West Puget Sound communities have changed their ridership behavior.

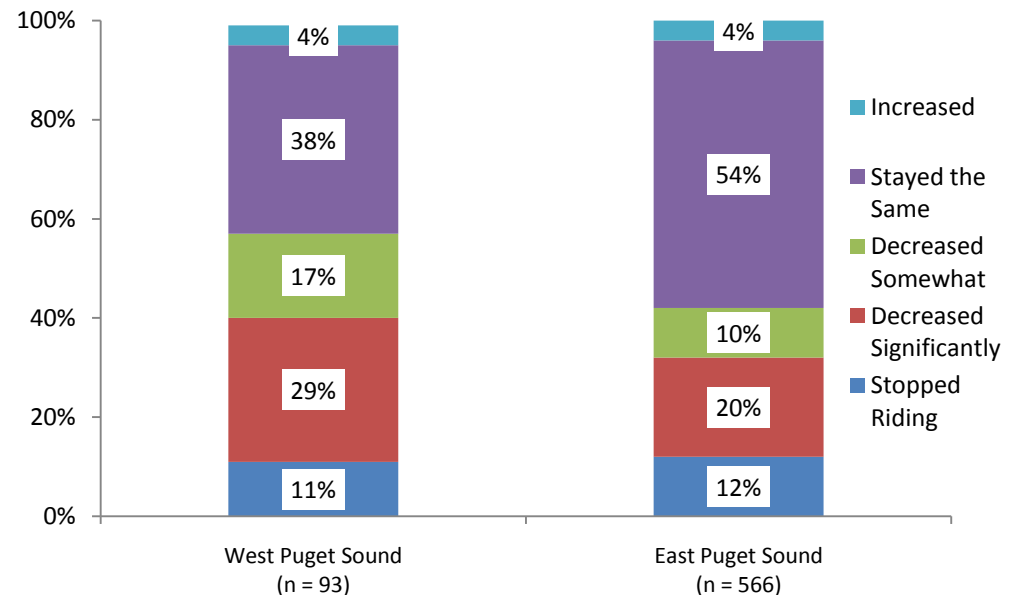
Eleven percent of all West Puget Sound infrequent riders (11% or 12 respondents) say that they have stopped riding the ferries – so are now non-riders. These residents have stopped riding because*:

- They no longer need to ride (4 respondents),
- They are elderly, disabled and don't leave home (2 respondents), and/or
- Fares are too high (1 respondent).

An additional 46 percent (or 43 respondents) of all West Puget Sound infrequent riders has decreased the frequency with which they ride – 29 percent say it has decreased significantly. Their reasons for decreasing the frequency with which they ride include:

- No need to ride / no longer do what we used to do (19 respondents),
- Fares are too high (13 respondents),
- Change in family situation (6 respondents), and/or
- Elderly / disabled / medical reasons make it so they no longer leave home (5 respondents).

Figure 6: Change in Frequency of Riding by Area of Residence



Question: Would you say the frequency with which you ride the Washington State Ferries has increased, decreased, or stayed the same?

Base: Respondents who have ridden WSF but not ridden within the last 3 months (n = 659)

* Due to the small number of respondents who stopped riding completely and who provided more than one reason for stopping riding, the actual number of respondents is shown rather than showing a percent of respondents.

Future Ridership

Prior to data collection, six reasons for potential changes in ridership were identified. Respondents who have stopped or decreased the frequency with which they ride the ferries and mentioned one or more of these as a reason for this change in riding were asked: "If this aspect of service was improved, would you change the frequency with which you ride?"

The service areas identified and the percent and number of infrequent riders who gave this as one of their reasons for no longer riding or decreasing the frequency with which they ride included:

- Ferry fares are too high (22% or 63 infrequent riders who have stopped riding or frequency of riding has decreased).
- Ferry waits are too long (4% or 10 infrequent riders who have stopped riding or frequency of riding has decreased).
- Ferry schedule is inconvenient (2% or 7 infrequent riders who have stopped riding or frequency of riding has decreased).
- Ferries are unreliable (2% or 5 infrequent riders who have stopped riding or frequency of riding has decreased).
- Ferry travel takes too long (2% or 5 infrequent riders who have stopped riding or frequency of riding has decreased).
- Time between ferry sailings is too long (1% or 2 infrequent riders who have stopped riding or frequency of riding has decreased).

Because of the small number of respondents listing the above as reasons for stopping or decreasing the frequency with which they ride, reliable analysis can only be conducted among those who responded that they have stopped or decreased their frequency of riding because the fares are too high (n = 63).

Potential Effect on Ridership if Fares Are Lowered

Forty-three percent (43%) of infrequent riders say that they have stopped or decreased the frequency with which they ride the ferries. Of these, 22 percent cite cost of ferry fares as the reason for this change. Thus, 9 percent* of infrequent ferry riders have stopped or decreased the frequency with which they ride because of the cost of ferry fares.

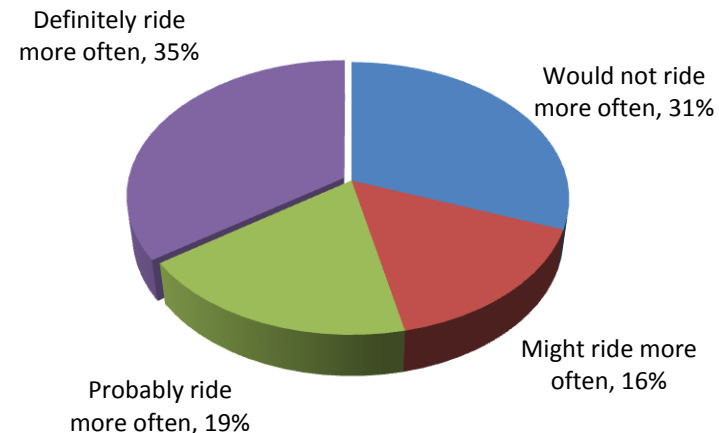
This group of respondents (n = 63) were then asked their likelihood of increasing frequency of ridership if fares were lowered.

More than one-third (35%) of those who have stopped or decreased the frequency with which they ride because of ferry fares state that they “definitely would ride more often” if fares were lower. Another 19 percent say they “probably would ride more often” if fares were lower.

- Thus, it could be estimated that if fares were lower, 3 percent* of all infrequent riders (those who have ridden a WSF but not ridden in the past three months) would definitely ride more often and an additional 2 percent* would probably ride more often.

This would suggest that if fares were lower, a small number (5%) of infrequent riders could start riding again or ride more often. The research does not investigate how much lower the fares would have to be and how often this segment of the population might ride.

Figure 7: Likelihood of Increasing Frequency of Ridership if Fares Were Lowered



Question: If the problem that the ferry fares are too high was improved, would you ride more?

Base: Infrequent riders who said “ferry fares are too high” as reason for decrease / stop (n = 63)

* Formula used to estimate: $9\% = 43\% \times 22\%$

* Formula used to estimate: $3\% = 43\% \times 22\% \times 35\%$

* Formula used to estimate: $2\% = 43\% \times 22\% \times 19\%$

Key Findings – Importance of and Funding for WSF

Summary – Importance of and Funding for WSF

The majority (95%) of people living in the Puget Sound regions primarily served by WSF agree that the Washington State Ferry system is important to the economy and growth of the region.

A majority of residents of the Puget Sound region feels that most of the costs should be paid for by system riders (50% of the costs) and residents of the communities served by the ferries (22% of the costs).

People on both sides of Puget Sound feel that approximately half the costs should be recovered in fares.

There are significant differences in attitudes about who should bear the balance (state vs. local taxes) of the costs of maintaining the ferry system between those living in the communities that rely most heavily on the ferries and those living in East Puget Sound communities.

Detailed Findings – Importance of and Funding for WSF

Importance of Ferry System

All respondents living in the Washington State Ferry affected communities were asked how important the ferry system is to the general economy and growth of the region.

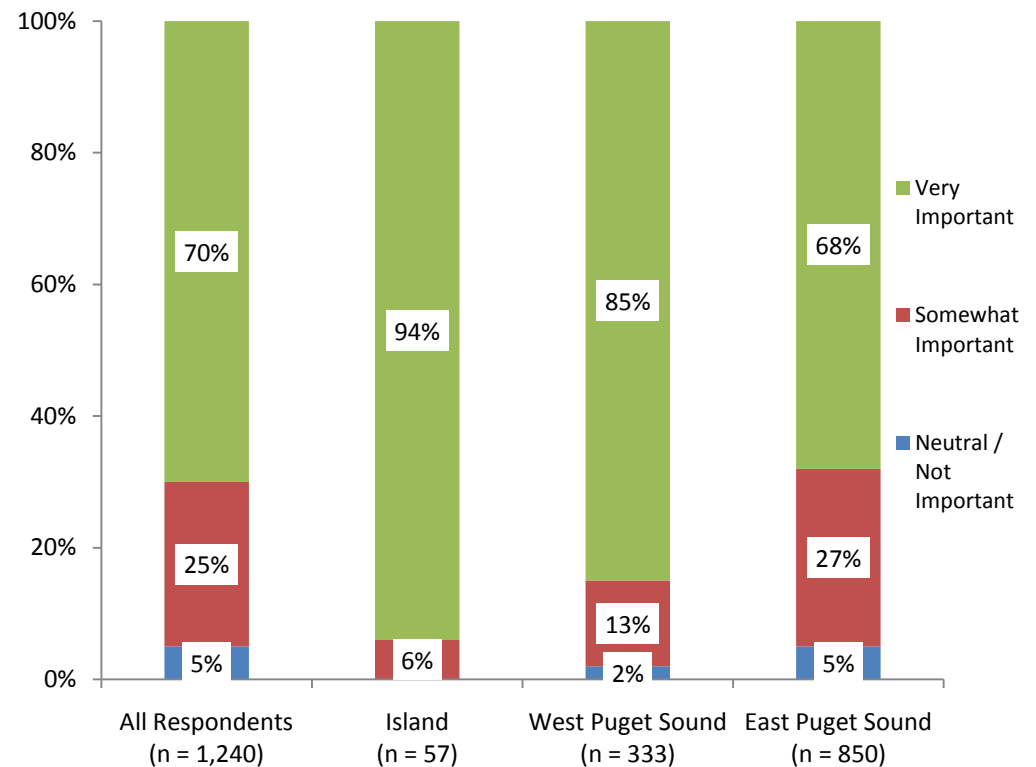
The majority (95%) of people living in the Puget Sound regions served by WSF agree that the Washington State Ferry system is important to the economy and growth of the region.

- Seventy percent (70%) says it is “very important” and another 25 percents say it is “somewhat important.”

Not surprisingly, **those in the Island communities** and, to a somewhat lesser extent, those in the **West Puget Sound** communities are more likely to **say the ferry is “very important”** than those living in the East Puget Sound region.

- Ninety-four percent (94%) of those in the Island communities, and 85 percent of those in West Puget Sound communities say the ferry system is “very important” to the general economy and growth of the region compared with 68 percent of those living in East Puget Sound communities.

Figure 8: Importance of Ferry System



Question: How important is Washington State Ferry system to the general economy and growth of the region?
Base: All respondents (n = 1,240)

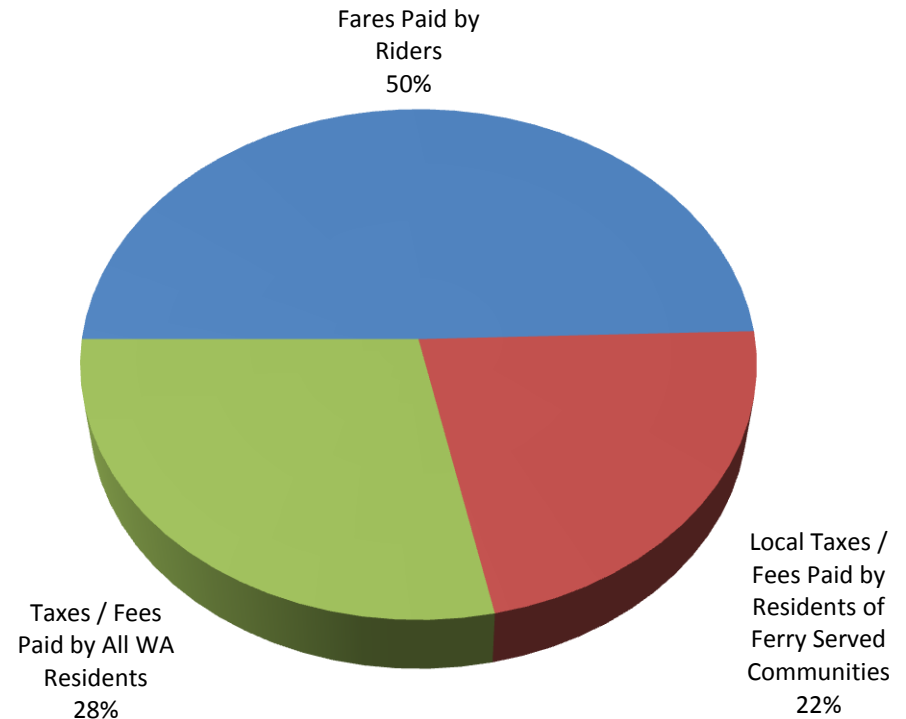
Funding for WSF – Distribution of Costs for Maintaining WSF

All respondents were asked what percent of the cost to maintain the Washington State Ferry system should come from each of the following three sources: (1) fares paid by all ferry riders, (2) local taxes or fees paid by residents of ferry-served areas, and (3) taxes and fees paid by Washington State residents. As a reference point, they were told that presently, 50 percent of costs are paid from Ferry system revenues, 50 percent of costs are paid from general taxes collected from all state residents, and 0 percent are paid with local taxes in communities served by the ferries.

Residents of the Puget Sound region clearly feel that **the majority of the cost should be paid for by those system riders and communities that rely most heavily on the ferries.**

- Puget Sound residents feel that half (50%) of the cost of maintaining the system should come directly from those riding the ferries, nearly the same percentage as what they were given as a reference point. In addition, residents feel that 22 percent of the cost should come from local taxes or fees paid by residents of ferry-served communities.
 - Thus a total of 72 percent of the cost of operating the ferry system should be paid for by riders and residents of the communities served by the ferries.
- Puget Sound residents feel the balance (28%) of the cost of operating the system should come from state taxes, suggesting that they would like to see the ferry communities assume a greater burden for funding the system.

Figure 9: Distribution of Cost of Maintaining Ferry System



Question: Currently 50% of the ferry system's revenues come from ferry users and 50% comes from general taxes paid by Washington State residents and 0% comes from local taxes in communities served by the ferries. What percent of the cost to maintain the ferry system should come from...?

Base: All respondents (n = 1,240)

There are significant differences in attitudes about who should bear the cost of maintaining the ferry system between those living in the communities that rely most heavily on the ferries, and those living in East Puget Sound communities.

Those living in the Island communities (Vashon and San Juan Islands) distribute the costs more evenly between those who use the ferry and/or live in the communities served by the ferries and all state residents.

- Those living in the Island communities feel that ferry riders should be responsible for just 34 percent of the cost of maintaining the system. An additional 19 percent should be paid for by local taxes and/or fees paid by residents of all ferry served communities.
- On the other hand, they feel that nearly half (47%) of the cost should be paid for by all Washington residents.

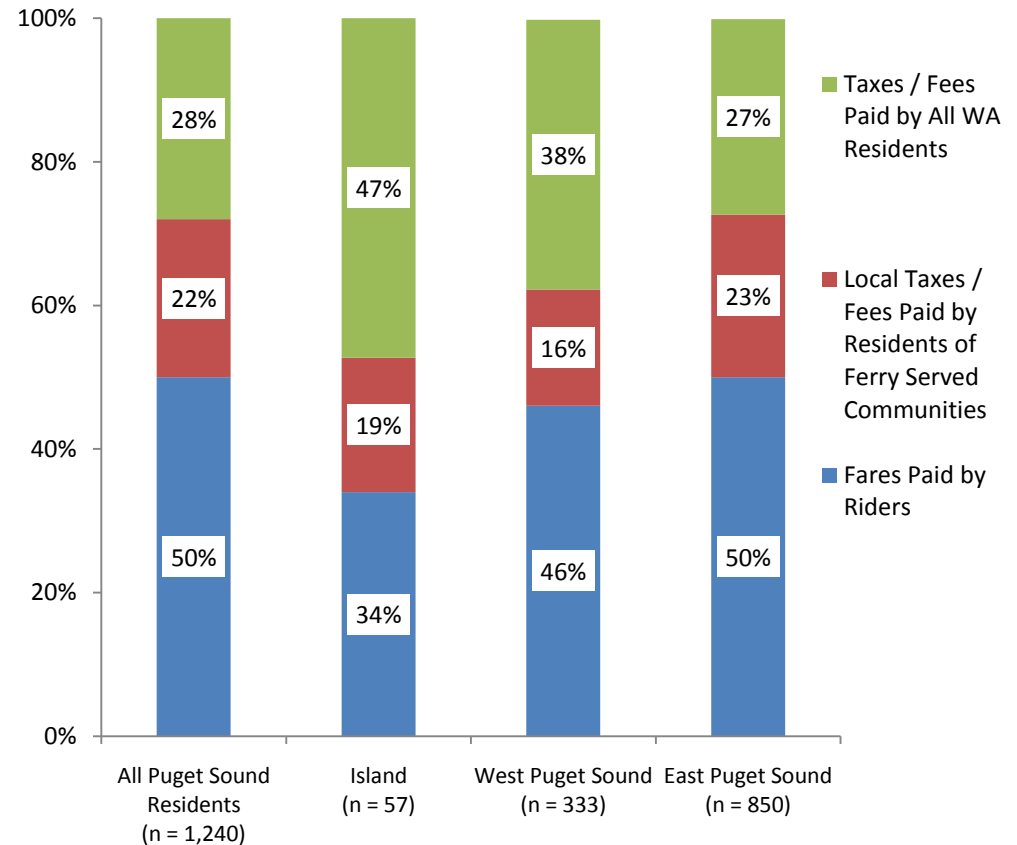
Those living in the West and East Puget Sound communities allocate similar amounts to fares paid by riders.

- Residents in the West Puget Sound communities feel that riders should be responsible for 46 percent of the cost of maintaining the system, nearly the same amount is given by those living in the East Puget Sound communities (50%).

On the other hand, West Puget Sound residents feel that more of the balance should be paid for by all Washington State residents while those living in East Puget Sound communities allocate more to local taxes / fees paid by residents of the ferry-served communities.

- Residents of West Puget Sound communities allocate 38 percent of the remaining costs to taxes and fees paid for by all Washington residents and 16 percent to local taxes and fees paid for by those living in ferry-served communities.
- Residents of East Puget Sound communities allocate 27 percent of the remaining costs to taxes and fees paid for by all Washington residents and 23 percent to local taxes and fees paid for by those living in ferry-served communities.

Figure 10: Distribution of Cost of Maintaining Ferry System by Area of Residence



Question: Currently 50% of the ferry system's revenues come from ferry users and 50% comes from general taxes paid by Washington State residents and 0% comes from local taxes in communities served by the ferries. What percent of the cost to maintain the ferry system should come from...?

Base: All respondents (n = 1,240)

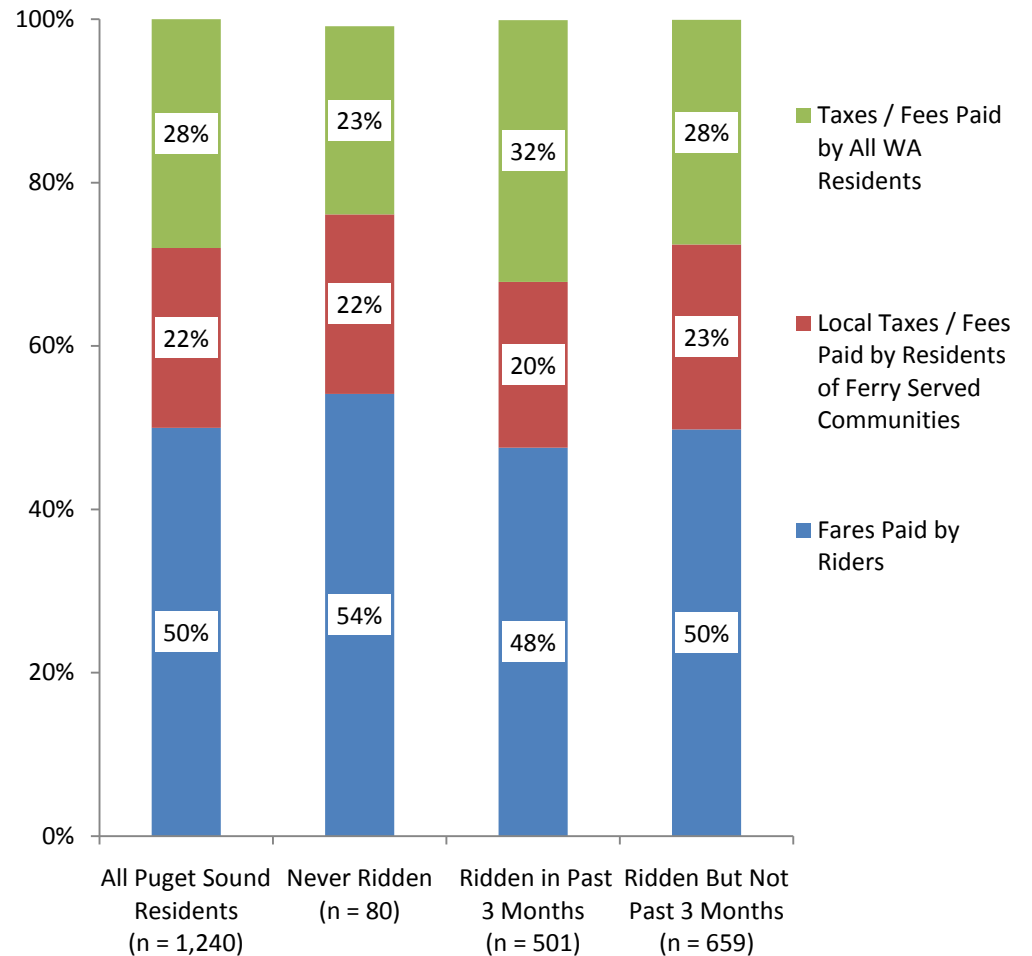
There are also significant differences in attitudes toward how the costs of maintaining the ferry system should be allocated between those who ride the ferries and those that do not. Residents of the Puget Sound region who have never ridden a ferry clearly feel that the majority of the cost of maintaining the system should be paid for by riders.

- Nonriders feel that riders should pay for 54 percent of the cost of the system; and that an additional 22 percent should be paid for through taxes or fees paid by residents of ferry-served communities.
- They feel that only 23 percent of the costs of maintaining the system should be paid for through taxes or fees paid by all Washington residents.

Ferry riders – both recent (those who have ridden in the past three months) and infrequent riders (those that have ridden a ferry but not in the past three months) – agree that approximately half (48% and 50%, respectively) of the cost of the system should be paid for by riders. They differ, however, in the distribution of taxes and fees.

- Recent riders (those who have ridden in the past three months) feel that a greater percentage should be paid for by all Washington residents.
 - Recent riders allocate 32 percent compared with 28 percent of infrequent riders (those that have ridden a ferry but not in the past three months).
- On the other hand, infrequent riders feel that a slightly greater percent should be paid for by residents of the ferry-served communities.
 - Infrequent riders allocate 23 percent of the costs to ferry-served communities compared with 20 percent by recent riders.

Figure 11: Distribution of Cost of Maintaining Ferry System



Question: Currently 50% of the ferry system's revenues come from ferry users and 50% comes from general taxes paid by Washington State residents and 0% comes from local taxes in communities served by the ferries. What percent of the cost to maintain the ferry system should come from...?

Base: All respondents (n = 1,240)

Appendix

Methodology

Questionnaire

The survey was relatively short, containing 15 questions plus 13 demographic questions. These questions focused on the following key topic areas:

- Past and current ridership,
- Routes ridden and primary trip purpose,
- Change in frequency of riding and reasons for change,
- Potential for future ridership,
- Importance of WSF to growth and region's economy, and
- Allocation of funding options.

Sampling

Surveys were conducted by telephone among a random sample of households in the areas immediately surrounding Puget Sound. These areas are made up of counties or portions of counties where residents have the greatest access to and hence the greatest likelihood of riding the ferry. These areas include:

- **East of Puget Sound:** King (excluding Vashon Island), Pierce, Snohomish, and Skagit,
- **West of Puget Sound:** All of Kitsap and Island and portions of Clallam and Jefferson Counties, and
- **Island:** Vashon and San Juan Islands.

The head of household, 18 years of age and older, was randomly selected to be interviewed. An approximately equal number of men and women were surveyed. In total, 1,240 Puget Sound residents were surveyed for this General Market Area Survey. The following table provides the final number of interviews per region:

Table 2: Sample Plan

		Communities East of Puget Sound	Communities West of Puget Sound	Island Communities
King County (excluding Vashon Island) Pierce County Snohomish County Skagit County		367		
		205		
		218		
		60		
	Total	850		
Island County Kitsap County Jefferson County Clallam County			46	
			154	
			37	
			96	
	Total		333	
Vashon Island San Juan County				39
				18
	Total			57

Post-stratification weighting is used to ensure that the results of this survey can be reliably projected to represent the general population of the areas surveyed. The following table shows the total and weighted sample sizes for each region. In testing for statistical significance, unweighted cell sizes are used and are shown throughout the report. As a general rule, caution should be taken when unweighted cell sizes are less than 50 (error rate is plus or minus 14 percent).

Table 3: Final Sample Sizes by Key Regions – Weighted and Unweighted

Communities East of Puget Sound		Communities West of Puget Sound		Island Communities		
Sample Size	Unweighted	Weighted	Unweighted	Weighted	Unweighted	Weighted
	850	1,094	333	138	57	8
	+ or – 3.4%		+ or – 5.4%		+ or – 13.0%	
* Precision is calculated for the maximum level of error that might be present at a 95 percent confidence interval.						

Questionnaire

The General Market Area & Infrequent Rider Survey used ORC's omnibus survey, SoundStats™. SoundStats™ is a shared cost survey that allows companies / agencies to include a set of questions on survey that is administered to a random sample of households in the State of Washington or in the Puget Sound region. The head of household, 18 years of age or older, is randomly selected to be interviewed. Following are the questions that were included in ORC's June 2008 SoundStats™ Survey for the 2008 WSF Customer Survey:

INTRODUCTION

INTRO Hello, my name is _____ from Opinion Research Northwest, a market research firm located in Boise, Idaho. Today / tonight we are conducting a survey of public opinions on a few selected topics. Please let me assure you that we are not selling anything. The survey is being conducted for research purposes only and your answers will be kept confidential. This call may be monitored and/or recorded for quality control purposes.

[AS NEEDED: Let me assure you this is not a sales call, and all the information you give will be kept strictly confidential. If you want more information on this survey, you may visit our web site – www.nwrg.com.]

[AS NEEDED: This survey will last approximately 7 minutes.]

[AS NEEDED: This survey will include general questions on a few selected topics.]

INTAA **[REPEAT IF NEW PERSON:** This is _____ from Opinion Research Northwest, a market research firm located in Boise.]

Today / tonight we are conducting a survey of public opinions on a few selected topics. Please let me assure you that we are not selling anything. The survey is being conducted for research purposes only and your answers will be kept confidential. This call may be monitored and/or recorded for quality control purposes.

If you would like more information on this survey, you may visit our web site – www.nwrg.com.

- 1 CONTINUE WITH INTERVIEW
- 2 RESPONDENT REFUSAL **[SKIP TO TKTERM, DISPO = 8]**

[FOR MID-INTERVIEW CALLBACKS]

Hello, this is _____ from Opinion Research Northwest, a market research firm located in Boise. I'm calling back to complete the survey we started.

[PRESS ANY KEY TO CONTINUE]

[PROGRAMMING NOTE: ASK FOR YOUNGEST MALE FIRST]

SCREENER

SCR1 **[FOR MALE]** To ensure that this survey is representative of Washington's population, I need to speak with the male in your household who is between the ages 18 and 54 and who had the most recent birthday.

Would that be you?

[FOR ADULT] For this survey, I need to speak to an adult in your household who is 18 years of age or older and who had the most recent birthday. Would that be you?

[IF ASK FOR MALE AND HH IS FEMALE ONLY, THEN ASK FOR FEMALE HEAD OF HOUSEHOLD

IF MORE THAN ONE MALE, THEN ASK FOR YOUNGEST]

NOTE: IF RESPONDENT IS 55 OR OLDER, SELECTION OPTION 4 BELOW

- 1 RESPONENT AVAILABLE
- 2 RESPONDENT NOT AVAILABLE [CTRL-END, SCHEDULE CALLBACK, DISPO =11]
- 3 NO ONE IN HOUSEHOLD IS 18 OR OLDER [SKIP TO TKAGE]
- 4 AGE 55 OR OLDER [SKIP TO TKAGE]
- 7 LANGUAGE BARRIER [SKIP TO TKLANG]
- 9 DON'T KNOW / REFUSED [SKIP TO TKTERM]

[NOTE TO PROGRAMMER – WE WANT TO ENSURE A 50/50 RANDOM GENDER SPLIT. NOTE, WE WILL HAVE TO DECIDE HOW TO DEAL WITH MALE ONLY / FEMALE ONLY HOUSEHOLDS; IF MORE THAN ONE MALE / FEMALE IN HOUSEHOLD, RANDOMLY CHOOSE BASED ON 50/50 CRITERIA]

COUNTY Do you live in [PUT IN SAMPLE COUNTY]?

- 1 YES
- 2 NO
- 9 DON'T KNOW / REFUSED

COUNTY2 **[IF STCOUNTY = NO OR DK/REF]** What county do you live in?

1 ADAMS
2 ASOTIN
3 BENTON
4 CHELAN
5 CLALLAM (98362, 98382, 98363)
6 CLARK
7 COLUMBIA
8 COWLITZ
9 DOUGLAS
10 FERRY
11 FRANKLIN
12 GARFIELD
13 GRANT
14 GRAYS HARBOR
15 ISLAND
16 JEFFERSON (98368, 98339, 98358, 98325, 98365, 98376, 98320)
17 KING
18 KITSAP
19 KITTITAS
20 KLINKITAT
21 LEWIS
22 LINCOLN

23 MASON
24 OKANOGAN
25 PACIFIC
26 PEND OREILLE
27 PIERCE
28 SAN JUAN
29 SKAGIT (98221, 98257, 98238, 98292, 98273, 98233, 98232)
30 SKAMANIA
31 SNOHOMISH
32 SPOKANE
33 STEVENS
34 THURSTON
35 WAHIAKUM
36 WALLA WALLA
37 WHATCOM
38 WHITMAN
39 YAKIMA
77 OTHER SPECIFY **[CLARIFY SPELLING; VERIFY IN ID; OTHERWISE SKIP TO TKQUOTA]**
88 DON'T KNOW **[CONTINUE – BRING IN FIPS FROM SAMPLE TO CODE]**
99 REFUSED **[SKIP TO TKTERM]**

[IF RESPONDENT COUNTY IS NOT WASHINGTON, TERMINATE - SKIP TO TKCOUNTY]

ZIPCODE **[IF STCOUNTY = 1]** Is your zip code **[PUT IN SAMPLE ZIP CODE]**?

1 YES
2 NO
9 DON'T KNOW / REFUSED

ZIPCODE2 **[IF STCOUNTY = NO OR DK/REF OR STZIPCODE = NO OR DK/REF]** What zip code do you live in?

99999 REFUSED

[IF RESPONDENT REFUSES ZIP CODE AND IN CLALLUM, JEFFERSON, OR SKAGIT COUNTY, TERMINATE - SKIP TO Next SECTION]

QUOTAS:

400 KING (50 in Vashon island 98070 and 98013)

200 Snohomish

200 Pierce

400 Mix of CLALLAM (98362, 98382, 98363), ISLAND, JEFFERSON (98368, 98339, 98358, 98325, 98365, 98376, 98320), KITSAP, SAN JUAN, SKAGIT (98221, 98257, 98238, 98292, 98273, 98233, 98232)

400 rest of state

GENDER [ENTER RESPONDENT'S GENDER]

- 1 MALE
- 2 FEMALE
- 9 DON'T KNOW / REFUSED

FERRY USAGE

F1 Have you ever ridden a Washington State Ferry?

- 1 YES
- 2 NO [SKIP TO F7]
- 8 DON'T KNOW [SKIP TO F7]
- 9 REFUSED [SKIP TO F7]

F2 When was the last time you rode a Washington State Ferry? Was it...

- 1 Within the past 30 days, [SKIP TO F7]
- 2 Within the past 3 months, [SKIP TO F7]
- 3 Within the past 6 months,
- 4 Six months to one year ago,
- 5 Between 1 and 5 years ago, or
- 6 More than 5 years ago?
- 8 DON'T KNOW
- 9 REFUSED

F3A What was the last Washington State Ferry route that you took? **[SELECT ONE]**
F3B What Washington State Ferry route do you take most often? **[SELECT ONE]**
[IF RESPONDENT SAYS SAN JUANS PROBE: WERE YOU TRAVELING TO OR FROM ANACORTES]

- 1 (Seattle / Bainbridge)
- 2 (Seattle / Bremerton)
- 3 (Edmonds / Kingston)
- 4 (Mukilteo / Clinton)
- 5 (Fauntleroy / Vashon)
- 6 (Fauntleroy / Southworth)
- 7 (Point Defiance / Tahlequah)
- 8 (Keystone / Port Townsend)
- 9 (Anacortes / San Juans (Includes Shaw,Orcas,Lopez, and Friday Harbor))
- 10 (Interisland San Juans (Includes Shaw,Orcas,Lopez, and Friday Harbor))
- 11 (Vashon / Southworth)
- 12 (Anacortes / Sidney)
- 13 OTHER [SPECIFY]
- 98 DON'T KNOW
- 99 REFUSED

F3C What other Washington State Ferry routes, if any, have you taken? **[SELECT ALL THAT APPLY]**

[READ LIST IF NECESSARY]

[IF RESPONDENT SAYS SAN JUANS PROBE: WERE YOU TRAVELING TO OR FROM ANACORTES]

- 1 (Seattle / Bainbridge)
- 2 (Seattle / Bremerton)
- 3 (Edmonds / Kingston)
- 4 (Mukilteo / Clinton)
- 5 (Fauntleroy / Vashon)
- 6 (Fauntleroy / Southworth)
- 7 (Point Defiance / Tahlequah)
- 8 (Keystone / Port Townsend)
- 9 (Anacortes / San Juans (Includes Shaw,Orcas,Lopez, and Friday Harbor))
- 10 (Interisland San Juans (Includes Shaw,Orcas,Lopez, and Friday Harbor))
- 11 (Vashon / Southworth)
- 12 (Anacortes / Sidney)
- 13 OTHER [SPECIFY]
- 98 DON'T KNOW
- 99 REFUSED

F4 You said your last ferry ride was on the **[INSERT RESPONSE FROM F3A]** ferry. What was your primary purpose for that particular trip?

[IF (F3A>10)] What was the primary purpose of your most recent ferry trip? **[PROBE FOR CLARIFICATION]**

- 1 (Commute to / from work)
- 2 (Commute to / from school)
- 3 (Work related activity / business)
- 4 (Personal business / activity)
- 5 (Everyday shopping)
- 6 (Major shopping (e.g. Costco, Walmart))
- 7 (Tourism / recreation)
- 8 (Travel to / from special event)
- 9 (Travel to from / see friends)
- 10 (Some other reason) **[SPECIFY]**
- 11 (Medical Appointments)
- 88 DON'T KNOW
- 99 REFUSED

F3A2 How often do you ride Washington State Ferries? **[READ LIST IF NECESSARY]**

- 1 (At least once a **week**)
- 2 (At least once a **month**)
- 3 (At least once every **3 months**) **[SKIP TO F4A]**
- 4 (At least once every **6 months**) **[SKIP TO F4A]**
- 5 (At least once every **year**) **[SKIP TO F4A]**
- 6 (**Less often** than once a year) **[SKIP TO F4A]**
- 7 VARIES **[SKIP TO F4A]**
- 8 DON'T KNOW **[SKIP TO F4A]**
- 9 REFUSED **[SKIP TO F4A]**

F3B2 **[F3A < 3]** In the last month, May 2008, approximately how many one-way trips did you take on Washington State Ferry? If you took a round-trip, count that as two-one way trips. **[VERIFY THAT NUMBER GIVEN IS IN ONE WAY TRIPS]**

_____ ENTER NUMBER OF ONE-WAY TRIPS

- 998 DON'T KNOW
- 999 REFUSED

- F4A Would you say the frequency with which you ride the Washington State Ferries has
- 1 Increased
 - 2 Stayed the same, or **[SKIP TO F7]**
 - 3 Decreased **[SKIP TO F4C]**
 - 8 DON'T KNOW **[SKIP TO F7]**
 - 9 REFUSED **[SKIP TO F7]**
- F4B **[F4A =1]** Would that be ...
- 1 Increased somewhat, or **[SKIP TO F7]**
 - 2 Increased significantly **[SKIP TO F7]**
 - 8 DON'T KNOW **[SKIP TO F7]**
 - 9 REFUSED **[SKIP TO F7]**
- F4C **[F4A =2]** Would that be ...
- 1 Decreased somewhat, **[SKIP TO F5A1]**
 - 2 Decreased significantly, or **[SKIP TO F5A1]**
 - 3 Have stopped riding the ferries completely? **[SKIP TO F5A2]**
 - 8 DON'T KNOW **[SKIP TO F5A1]**
 - 9 REFUSED **[SKIP TO F5A1]**
- F5A1 **[IF F4A EQ 3 AND F4C NE 3]** What is the **primary** reason you are riding Washington State Ferries less often?
[PROBE AND CLARIFY PRIMARY RESPONSE – RECORD ONLY ONE RESPONSE]
- F5B1 **[IF F4A EQ 3 AND F4C NE 3]** Why else have you decreased the frequency with which you ride?
[PROBE AND CLARIFY OTHER RESPONSES – RECORD ALL RESPONSE]
- F5A2 **[IF F4C EQ 3]** What is the **primary** reason you have stopped riding the Washington State Ferries completely?
[PROBE AND CLARIFY PRIMARY RESPONSE – RECORD ONLY ONE RESPONSE]

F5B2

[IF F4C EQ 3] Why else have you stopped riding the ferries completely?

[PROBE AND CLARIFY OTHER RESPONSES – RECORD ALL RESPONSE]

- 1 FERRY FARES ARE TOO HIGH
- 2 FERRY TRAVEL TAKES TOO LONG
- 3 FERRIES WAITS ARE TOO LONG
- 4 FERRIES ARE UNRELIABLE
- 5 FERRY SCHEDULE IS INCONVENIENT
- 6 TIME BETWEEN FERRY SAILINGS IS TOO LONG
- 7 CHANGES IN MY WORK OR SCHOOL SCHEDULE
- 8 CHANGED JOBS
- 9 RETIRED / NO LONGER WORKING
- 10 CHANGED RESIDENCES / MOVED
- 11 WORK AT HOME / TELECOMMUTING
- 12 CHANGE IN FAMILY SITUATION / FAMILY MOVED / CHILDREN GROWN / **FRIENDS MOVED**
- 13 HAVE NO NEED TO RIDE / DON'T DO WHAT WE USE TO DO
- 14 OTHER COSTS **[SPECIFY]**
- 15 OTHER **[SPECIFY]**
- 16 OTHER **[SPECIFY]**
- 17 **NO OTHER REASONS (F5B1 and F5B2 only)**
- 18 **NO REASON / JUST STOP**
- 19 **PREFER TO DRIVE INSTEAD**
- 20 **ELDERLY / DISABLED / MEDICAL REASONS / DON'T LEAVE HOUSE**
- 98 DON'T KNOW
- 99 REFUSED

F6A1 **[IF F5A1 OR F5A2 EQ 1-6]** You mentioned [insert Q5A1 or Q5A2 response] as the primary reason you decrease the frequency with which you ride the ferries. If this service on the ferries was improved, would you.. (read list)

- 1 Definitely ride more often,
- 2 Probably ride more often,
- 3 Might ride more often, or
- 4 Not ride anymore often?
- 8 DON'T KNOW
- 9 REFUSED

Q6B1 **[IF F5B1 OR F5B2 EQ 1-6]** You mentioned **[RESPONSE Q5B1 OR Q5B2]** as another reason for you decreasing the frequency with which you ride the ferries. If these ferry services were improved, would you...

- 1 Definitely ride more often,
- 2 Probably ride more often,
- 3 Might ride more often, or
- 4 Not ride anymore often?
- 8 DON'T KNOW
- 9 REFUSED

F6B2 **[IF F5B1 OR F5B2 EQ 1-6]** You mentioned **[RESPONSE F5B1 OR F5B2]** as another reason for you decreasing the frequency with which you ride the ferries. If these ferry services were improved, would you...

- 1 Definitely ride more often,
- 2 Probably ride more often,
- 3 Might ride more often, or
- 4 Not ride anymore often?
- 8 DON'T KNOW
- 9 REFUSED

F7 Based on what you know, have read, or experienced, in your opinion, how important is Washington State Ferry system to the general economy and growth of the region? Would you say...

- 1 Very important,
- 2 Somewhat important,
- 3 Somewhat unimportant
- 4 Not important at all
- 5 NEITHER IMPORTANT OR NOT IMPORTANT
- 8 DON'T KNOW
- 9 REFUSED

F8 Currently 50% of the ferry system's revenues come from ferry users and 50% comes from general taxes paid by Washington State residents and 0% comes from local taxes in communities served by the ferries. What percent should each of the following groups pay to maintain the ferry system?

[RANDOMIZE ORDER – MUST SUM TO 100%]

- 1 Fares paid by all ferry riders ____
- 2 Local taxes or fees paid by residents of ferry-served areas ____
- 3 Taxes and fees paid by Washington State residents ____
- 998 DON'T KNOW
- 999 REFUSED